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## Microsoft Dynamics 365 Customer Experience Analyst Sample Questions (Q36-Q41):

### NEW QUESTION # 36

A company is using Dynamics 365 Sales to track their sales pipeline.

Sales managers require their forecasting to include reasons why opportunities were lost, including losses to competitors.

You need to configure the sales process WITHOUT using custom code.

What should you do? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

### Answer:

Explanation:

Reference:

Steps to Modify the Status Reason Option Set:

Go to Settings > Customizations > Customize the System.

Locate the Opportunity entity and open its Fields section.

Find and select the statuscode (Status Reason) field.

Add new options to represent specific loss types and save the changes.

Publish the customization to make the new Status Reason options available for users.

Requirement: Record the Loss for Forecasting

Sales managers need to include lost opportunities and their reasons in forecasting. To ensure that this information is captured accurately, modifying the Opportunity Close form will allow users to specify details when marking an opportunity as closed (won or lost).

By customizing the Opportunity Close form, you can include fields that capture detailed information required for forecasting, such as the type of loss and any competitor information. This ensures that loss details are available for analysis and forecasting without needing custom code.

Steps to Modify the Opportunity Close Form:

In the Sales Hub, navigate to App Settings > Close Opportunity Experience.

Customize the Opportunity Close form to include fields that are relevant to capturing loss information, such as adding fields for competitors or reasons.

Save and publish the form to reflect the changes.

By modifying the Status Reason option set and customizing the Opportunity Close form, you enable the sales team to record detailed reasons for lost opportunities, which will support accurate forecasting and analysis, all without using custom code.

### NEW QUESTION # 37

You are customizing a workspace in the sales accelerator.

The workspace must display the industry of a company.

You need to configure the work item appearance for a company.

Which two settings should you modify? To answer, select the appropriate UI element in the answer area.

NOTE: Each correct selection is worth one point.

**Answer:**

Explanation:

### NEW QUESTION # 38

Your organization is using Dynamics 365 Sales to track its sales pipeline, and you have implemented sales forecasting using the out-of-the-box sample forecast configuration.

The vice president of sales wants the forecast to categorize lost deals using the more detailed opportunity status code reasons of "Cancelled" and "Outsold." You need to enable the detailed categorization requested by the vice president of sales.

Which two actions should you take? Each answer presents part of a solution. (Choose two.) NOTE: Each correct selection is worth one point.

- A. Update the field mappings in the Opportunity Forecast Category Mapping Process workflow.
- B. Add the detailed lost reasons to the opportunity forecast category option set.
- C. Create a new cloud flow to map opportunity state code to forecast category.
- D. Add the detailed lost reasons to the msdyn\_forecastinstance status code option set.

**Answer: A,B**

Explanation:

To ensure that the sales forecast categorizes lost deals using more detailed reasons like "Cancelled" and "Outsold," you need to modify how the opportunity status codes are mapped to the forecast categories.

Add the detailed lost reasons to the opportunity forecast category option set This ensures that the system can recognize and categorize opportunities as "Cancelled" or "Outsold" within the forecast. The forecast category option set must be updated to accommodate the new lost reasons.

Update the field mappings in the Opportunity Forecast Category Mapping Process workflow This workflow determines how opportunity status codes map to forecast categories. Updating the field mappings ensures that opportunities with "Cancelled" or "Outsold" reasons are correctly classified within the forecast.

### NEW QUESTION # 39

Case Study 1 - Contoso Ltd

Background information

Contoso Ltd. has started a new division that provides janitorial services to businesses.

The sales teams for this division are using a dedicated instance of Dynamics 365 Sales.

Contoso Ltd.'s sellers are becoming accustomed to Copilot in Sales and Sales Insights features.

They have identified several desired enhancements.

#### System configuration

The base currency for all opportunities in the system is US dollars (USD). The administrator has NOT enabled installed premium Sales Insights features. All users have Premium licenses.

Contoso Ltd. uses Exchange Online for email.

Only three default insights cards are turned on:

1. Close date coming soon
2. Meeting today
3. Upcoming meeting

The system administrator has set the following days before notifying me value for the Close date coming soon card to 21 days.

Contoso Ltd. has also just set up Dynamics 365 Customer Insights

- Journeys for marketing automation. No segments or customer journeys have been defined yet.

Dynamics 365 Sales and Customer Insights - Journeys both share the same instance of Microsoft Dataverse.

Copilot in Dynamics 365 Sales settings

The following screenshots show the configured fields for opportunity settings summaries and recent changes in Copilot.

#### Contoso Ltd. Personnel

##### Business development managers

Contoso Ltd. has 30 business development managers (BDMs) across its sales teams. Each BDM is responsible for selling janitorial services to new and existing clients. All BDMs are assigned the sales manager security role in Dynamics 365 Sales.

Any BDM can own an opportunity, even if a different BDM owns the client account record. Any other BDMs assigned to work on the opportunity will be included in the opportunity record's sales team. Opportunity records owned by a BDM will never include any additional client stakeholders other than the named contact for the opportunity.

The BDMs have been told to document all client communications in Dynamics 365, but they frequently exchange emails with client contacts through Microsoft Exchange WITHOUT tracking them in Dynamics 365.

##### Digital sales team

Contoso Ltd. has a digital sales team that comprises 10 junior sales resources who focus on lead qualification and conversion to opportunities. Members of this team are assigned a single custom security role named Digital seller that is a copy of the standard Salesperson role. View audit history and view audit summary permissions are disabled.

The team currently receives leads from an online form on Contoso Ltd.'s website. Many online lead submissions end up being duplicates, and the team manually reconciles the duplicates by comparing last name, email address, and phone number for all submitted leads.

##### Clients

##### Client tiers

Clients are grouped into tiers based on annual revenue as calculated in a system outside Dynamics 365 Sales. Clients receive different levels of ongoing service and support based on their tier assignment.

Annual revenue values for accounts and corresponding tier values are written to Dynamics 365 through a nightly batch process.

Client tier values are only updated when they change, and tier value will always be blank for accounts with no calculated annual revenue.

The tier structure is:

Tier A -- annual revenue greater than or equal to \$10,000,000 USD

Tier B -- annual revenue greater than \$5,000,000 USD and less than \$10,000,000 USD Tier C -- annual revenue greater than \$0 USD and less than or equal to \$5,000,000 USD The tier label is stored in a custom text field named Client tier (contoso\_clienttier) that contains only a single letter or is blank.

##### Northwind Traders account

There are three BDMs who frequently work together on large opportunities.

BDM1 is the account owner for Northwind Traders, a multinational client.

- BDM1 owns all Northwind Traders opportunities with estimated revenue greater than or equal to

\$1,000,000. BDM2 and BDM3 are assisting BDM1 with several opportunities for Northwind Traders in different cities.

- BDM3 owns all other Northwind Traders opportunities. BDM3 is NOT a sales team member for any of the opportunities BDM1 owns.

- BDM2 is a sales team member for all Northwind Traders opportunities.

Client Contact1 is the primary contact for the Northwind Traders' account. There are two other client contacts with whom the Northwind account team regularly engages - Client Contact2 and Client Contact3.

##### BDM1 and Northwind Traders account

BDM1 has been on vacation for two weeks. During vacation, BDM1 did NOT log into Dynamics 365, and BDM2 made the following updates to several open Northwind Traders opportunities.

BDM2 also scheduled an internal meeting with BDM1 for the day they return to discuss a request from the primary contact for the account. The meeting has the "London office" opportunity as its regarding value.

##### Desired enhancements

The global sales lead requests the following enhancements:

1. A "Welcome" email should be sent to the primary contact for an account when the account first enters any client tier. This email should only be sent to the primary contact once.
2. Account owners should receive immediate notifications in the assistant in Dynamics 365 Sales when accounts change tiers. The notifications should include the account name and current tier.
3. A "Getting started" email should be sent to the main contact associated with an opportunity when the opportunity status is set to "Won."

1. The email should include a link to a custom onboarding form where the contact can supply information required to start the janitorial services for a given location.
2. If the contact does NOT click any links in the email, a follow-up email should be sent.
4. All emails between BDMs and client contacts should be available for relationship analytics KPIs. Emails sent by other users outside of Dynamics 365 should NOT be included in the KPIs.

The digital sales team lead requests the following enhancements:

1. The ability for team members to use Copilot to summarize changes to lead records.
2. Replace the current online form used by their team to capture new leads. The new form should automatically handle duplicates using the rules the team currently applies manually.

Drag and Drop Question

You need to create and start a new customer journey to send "Welcome" emails to new customers.

Which three actions should you perform in sequence before you publish the journey? To answer, move the three appropriate actions from the list of actions to the answer area. Arrange the three actions in the correct order.

**Answer:**

Explanation:

Explanation:

1. Create a trigger-based journey that triggers on changes to the contoso\_clienttier field. Since the "Welcome" email should be sent when an account first enters any client tier, a trigger-based journey is required. The trigger should activate when the contoso\_clienttier field is updated with a value.
  2. Select the frequency as a one-time journey where newly added members can start at any time.
- A one-time journey with newly added members ensures that each new primary contact will enter the journey when their account first gets assigned a tier.
3. Add the journey steps.

After defining the journey type and trigger, the necessary email steps (sending the "Welcome" email) must be added before publishing.

#### NEW QUESTION # 40

A bakery uses Dynamics 365 Sales. All loaves of bread sold at the bakery are priced the same. Special bread flavors are developed regularly.

You need to add a new flavor to the product catalog.

What should you do for each scenario? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

**Answer:**

Explanation:

Reference:

Steps to Create a Product Property:

Go to Sales > Product Catalog > Products.

Open the existing product (bread) and navigate to Product Properties.

Add a new property (flavor) and define the possible values (e.g., new flavors).

Save and publish the product with the updated properties.

Scenario 2: Changing an Order to a New Bread Flavor in an Opportunity

When a customer wants to change their order to a new flavor within an existing opportunity, the selected product in the opportunity can be updated to reflect the new flavor.

Since flavors are configured as product properties, you can select the specific flavor for the opportunity product directly without needing to recreate or delete the product from the opportunity.

This approach leverages product properties, ensuring that the change is streamlined and does not require re-adding or modifying the core product.

Steps to Select a New Flavor in the Opportunity Product:

Open the specific opportunity record in Dynamics 365.

Navigate to the product line items and select the bread product.

In the product properties, update the flavor to the new option as required.

Save the changes to ensure the opportunity reflects the new flavor selection.

These actions allow the bakery to manage new flavors flexibly within their product catalog and seamlessly adjust opportunities to accommodate flavor changes, enhancing customer satisfaction and operational efficiency.

## NEW QUESTION # 41

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